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ABSTRACT

This paper examines ways in which the operation of charter schools by "comprehensive management" educational management organizations (EMOs) influences the decentralized nature of charter schools, particularly in the area of educational issues. It provides a comparative case study of three for-profit EMOs that provide comprehensive management and six of the schools they operate. Based on interviews with principals, board members, teachers, and company staff members, it describes the company's approach to educational issues and the relationship between the company and each school regarding these issues. The analysis compared the designs used by the companies and the influence of the design and overall company approach on the process of developing an educational program for the specific school. The report finds that although the three companies and six charter schools demonstrated a variability of approaches, there were some common threads. Each EMO demonstrated a commitment to school leadership, even when they implemented divergent management techniques, ranging from a top-down approach to more collaborative approaches. For schools, understanding the nature of the designs offered by EMOs and where these designs "sit" can lend important insights into what role the school will play in the educational programs offered. (Contains 50 references.) (RJM)

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**Occasional Paper No. 60**

National Center for the Study of Privatization in Education

Teachers College, Columbia University

# Recentralizing Decentralization?

## Educational Management Organizations and Charter Schools' Educational Programs[1]

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## Introduction

Charter schools are the most decentralized form of recent reforms granting public schools greater autonomy, with decision-making around issues such as hiring, budget, mission and educational program shifted to the school site (Wohlstetter, Wenning, & Briggs, 1995). However, the growth of educational management organizations (EMOs) that operate charter schools has raised the possibility of a change in charter school autonomy. EMOs, with corporate staffs outside the school building making decisions for individual schools, create a new, potentially centralizing force in this highly decentralized reform effort. For example, a study of Michigan charter schools found that, "While charter schools are intended to have their own boards with decisions made locally, the growing involvement of EMOs has had an impact on the level of local control" (Horn & Miron, 2000, p. 48). At the same time that a large number of charter schools have been created over the last decade (2,700 by the fall of 2002, according to the Center for Education Reform), EMOs have become increasingly involved in managing these schools.

The growing involvement of EMOs is a critical part of the charter school landscape and has significant potential implications for the operation of charter schools as autonomous organizations with site-based decision-making. However, the implications of these companies and their work with charter schools extends to public education more broadly and to the role of government in funding versus providing education (Hill, Pierce, & Guthrie, 1997; Lyons, 1995) (Fitz & Beers, 2002). Privatization of publicly-funded education – especially privately-operated public schools – has received increasing attention in recent years, with the most visible case being the 2001 state takeover of the Philadelphia public schools and the resulting "multiple provider model" adopted by the city (which involves management of some schools by for-profit

companies, community-based organizations, and universities) (Gewertz, 2002). Attention to for-profit educational management organizations that operate whole schools is likely to increase in the coming years, since private management is one of the options for continually "failing" schools in the *No Child Left Behind Act* of 2002. This paper examines how the operation of charter schools by "comprehensive management" EMOs influences the decentralized nature of these schools, particularly in the area of educational issues.

In this comparative case study, I present case descriptions of three for-profit EMOs that provide "comprehensive management" and six of the schools they operate, describing the company's approach to educational issues and the relationship between the company and each school around these issues. The cross-case analysis compares the designs used by the three companies, and the influence of the design and overall company approach on the process of developing an educational program for the specific schools. The analysis builds towards a greater understanding of the impact of EMOs on the decentralization idealized in charter school reform, drawing on issues of the power of charter schools in the EMO-school relationship around questions of both "exit" and "voice" (Hirschmann, 1970).

EMOs are a relatively new participant in the operation of entire schools. While an appropriate level of scrutiny of their motives is necessary, research that examines their practices is also important. Understanding relationships such as those examined in this paper can not only illuminate the charter school-EMO relationship, but also can shed light on how private companies in general might work with public schools or operate private schools if moves towards broader school privatization were to take hold. People fear that the growth of these companies as charter school managers will recentralize this reform originally intended to give school stakeholders greater influence. My data suggest that recentralization varies based on how

developed and prescriptive the model used by the EMOs is. In addition, while recentralization may occur, boards of EMO-operated charter schools also have a new kind of power, not available to district-run schools, through their ability to exit their relationship with an EMO.

**Charter Schools and Autonomy**

Decentralization in education is a broad term that education reformers have used to encompass essentially any shift in power, control, or autonomy to some lower level in the governance system. One policy brief included such ideas as choice programs, state support for local innovation through regulatory flexibility, and district decisions to devolve power to schools as forms of decentralization (Center for Policy Research in Education, 1990). The basic logic behind decentralization is that those people who work most closely with students are in the best position to determine what is most effective educationally for those students and how resources can be most efficiently allocated.

Charter schools are relatively autonomous schools of choice that receive a "charter" or contract (usually for 3-5 years) from a public entity (such as a local school board, a public university, or a state board of education). These contracts provide school operators with more autonomy than a district-run public school, although the level of autonomy varies based on state law, authorizers approach, and other factors (see Bulkley & Fisler, 2002 for a review of research on charter schools). The original charter school idea focused on small groups of teachers, parents, and/or community members creating schools that would serve localized needs and purposes and be highly responsive to the school's stakeholders (Budde, 1989; Nathan, 1996). According to Joe Nathan, one of the founders of the charter school idea, "Charter school advocates agree with the rationale for site-management – that critical decisions about budget,

personnel, curriculum and instruction should be made by people at the local school site" (Nathan, 1996, p. 9).

Charter school advocates have generally considered more autonomy to be better (c.f. Kolderie, 1990), but the research is not completely clear on this matter. One study found, for example, that schools with greater autonomy from their districts were better able to create and sustain a learning community and respond quickly to problems, but were more consumed by managerial decisions (Wohlstetter & Griffin, 1998). Another study suggested that, despite their desire for autonomy, charter schools often turn to their district's bureaucracy when they need help (Wells & others, 1998). Some schools, particularly those with weak organizational structures, may have more difficulty capitalizing on their autonomy (Wohlstetter & Griffin, 1998). Studies of site-based management have also noted the need for a clear educational mission alongside additional autonomy in order for this form of decentralization to have positive effects (Briggs & Wohlstetter, 1999; Louis, Kruse, & Bryk, 1995).

**EMOs and Charter Schools**

Development of charter school legislation has been accompanied by a growing interest among policy makers and business people in increasing the role of the for-profit sector in the provision of education. As the American public has become disenchanted with other efforts to improve public education, attention to options such as EMOs has increased. According to one report, "Public interest in contracting clearly reflects Americans' desperation about fixing schools now. Many are demoralized that the rash of school reform efforts launched over the last decade has failed to turn the tide" (Richards, Sawicky, & Shore, 1996, p. 49).

EMOs are both one of the most intriguing -- and controversial -- aspects of the growth of charter schools. The first experiments with for-profit EMOs managing entire schools included

the unsuccessful involvement of Educational Alternatives, Inc., in Baltimore in the early 1990s and the beginnings of public management by Edison Schools in the mid-1990s (Ascher, Fruchter, & Berne, 1996; Richards et al., 1996). Current estimates are that for-profit EMOs manage as many as 15%-20% of charter schools, and continued growth is anticipated (Arsen, Plank, & Sykes, 1999; Molnar, 2001). EMOs provide management services that range from bookkeeping or report writing to comprehensive management (see below) that involves virtually every aspect of a school's operations (Lin & Hassel, 1999).

The charter school movement provides an ideal alternative to managing district-run public schools for education management companies interested in gaining contracts to operate publicly funded schools while maintaining autonomy. As one report noted, "The legal structure of public education presents numerous stumbling blocks to schools that want to consider private management... Charter school legislation removes some obstacles to more diverse participation in managing publicly financed schools" (Richards et al., 1996, p. 52). Charter schools in most states (with Arizona the prominent exception) are required to have their own non-profit boards. For the most part, it is these boards that hire an EMO, negotiate contracts, and decide whether or not to renew their contracts. From the perspective of EMO advocates (not all charter advocates are EMO advocates), such use of private providers can increase the supply of schools – and thus competition – and bring new investors and greater efficiency into public education (Murphy, 1996).

While the growth and potential impact of EMOs has been noted (Dykgraaf & Lewis, 1998; Furtwengler, 1998; Schnaiberg, 1999; Symonds, Palmer, Lindorff, & McCann, 2000), there has been little research on this new phenomenon (Miron & Applegate, 2000; Molnar, 2001; Rhim, 1998; Richards et al., 1996; Scott, 2001). This paper focuses on those EMOs that provide

comprehensive services, defined as companies that offer "'soup-to-nuts' educational programming and management for schools" (Lin & Hassel, 1999, p. 9). Such companies are also called "full service operators" (Horn & Miron, 2000). While public attention has focused on a small number of companies (especially Edison Schools), an earlier paper in this study identified 21 companies that, in the fall of 2001, identified themselves as providing comprehensive management to three or more schools (Bulkley, In press). These companies managed more than 300 charter schools serving over 125,000 students in 20 states and the District of Columbia.

The autonomy available to charter schools both gives EMO operators considerable leeway in how they approach working with these schools and grants schools that contract with EMOs flexibility in the style of the EMO they select (when the boards of the schools are not recruited by the company itself). EMOs must deal with tensions between their own needs for efficiency, control, and some level of "brand name" consistency and the wishes of members of the school community. Earlier research suggests that some school personnel may resist a company's attempt to put in place a particular educational vision. For example, a number of schools in a Michigan study, "expressed concern with the management companies, primarily due to the issue of control over the curriculum and focus of the school" (Horn & Miron, 2000, p. 47).

EMOs are not the only type of organization that has struggled with seeking reform while still allowing for school-based autonomy. Districts moving towards site-based management have faced similar challenges, and have often responded by minimizing the amount of power actually shifted to the school site (c.f. Wohlstetter & Buffett, 1992). Organizations supporting the implementation of whole school reform models in schools have also had to determine how decisions about educational programs should be decided (Bodilly, 1996, 1998; Kirby, Berends, & Naftel, 2001). Bodilly and her colleagues found that who was involved in design development

was one important aspect of school designs or models – was the design team (external to the school) the primary developer, or were school personnel extensively involved in site-based development. The location of these decisions had important implication, with more specified external designs more likely to lead to high levels of design implementation at the school site (Bodilly, 1998; Kirby et al., 2001).

**Research Questions**

This paper uses interviews with school stakeholders (including principals, board members and teachers) and company staff, along with supplementary documents, to examine how EMOs are influencing the recentralization issue by exploring the ways in which they work with charter schools in implementing and/or building the educational program used in the school. Thus, the primary research question is:

- How are these three EMOs influencing decisions about education for the schools they manage and, in doing so, effecting the decentralized nature of charter schools?

Two sub-questions help to explore this issue by focusing on the nature of the educational approach used by each company, and the strategies companies and schools used to work together in developing the educational program used at the school site.

1) What is the nature of the educational approach that each EMO brings to the schools with which it works?
2) How did the educational approach in schools working with each EMO develop, in light of the nature of the approach itself, and what role did the company and other stakeholders have in that development?

The first question examines what kinds of parameters companies use to develop "commonality" among schools they operate (i.e. mission or vision, specific educational program,

etc.) and where their designs allow/promote variation. For EMOs, there are a number of different ways to influence the educational program offered in schools and the choices made about what "tools" or elements to include in the program have important implications for the autonomy, or amount of "choices," that school stakeholders are able to make (see Bulkley, In press for a discussion of the tools used by 21 comprehensive management companies). Such tools are similar to those used by school districts promoting reform, and include specific curriculum, assessments, instructional approaches or professional development (Spillane, 2000). The second question focuses on the process of creating or implementing the actual educational program used in the six case study schools, including the role of different stakeholders in this process.

## Study Data and Methods

### *Sampling*

Three companies and two schools operated by each company were selected for this study. The companies were selected based on a previous study that examined the universe of for-profit EMOs that offered "comprehensive management" services (as defined above) and that had management contracts with at least three charter school boards (Bulkley, In press, see study for more information about inclusion criteria). For that study, telephone interviews were conducted with representatives of 15 of the 21 identified companies. The companies operated between 3 and 70 charter schools each, with each EMO serving between 900 and over 30,000 students. Six companies were classified as "regional" (operating in only one state), while the remaining were "national companies" that operated in 3 to 17 states and/or the District of Columbia.

The earlier study identified three general ways in which comprehensive management EMOs approach issues directly related to the educational program in the schools they manage,

including the mission/vision of the schools, the curriculum, materials, instructional/pedagogical approaches, student assessment and school structure in the schools they operate[2] (Bulkley, In press). These three approaches were the "all-purpose" (company provides educational services, but is "customer-driven" as to the specifics of those services), "mixed-autonomy" (the educational program is prescribed by the company in some areas, but quite flexible in others) and "high-influence" (company is highly controlling in all major aspects of schools' educational programs) strategies. Most company representatives said that their organization had a single approach to issues of autonomy versus company influence (although relationships with particular schools likely vary within these patterns). One company using each type of approach was selected with the intent of observing a range of EMO practices (Yin, 1994). Using the categories developed in the earlier study, Company A is a national company labeled "high-influence," Company B is a regional company identified as "mixed-autonomy," and Company C is a national company labeled "all-purpose." Tables 1 and 2 show the autonomy available to schools working with each company, according to company staff.

For purposes of access, company staff were asked to select schools to be included in this study; thus, the schools visited were to a certain extent "exemplars" of a company's vision from the perspective of company staff. Schools were contacted based on these recommendations, and were given a nominal donation for their participation.

*Data Collection and Analysis*

One or two researchers conducted one-day site visits at each of the six schools operated by each company. During these visits, interviews were conducted with school administrator(s), 2-4 teachers, members of the school's governing board and, when possible, one or more parents.

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[2] While the literature on site-based management does not focus on governance as a part of the educational program, EMO central office staff often see them as closely intertwined.

At the school level, a total of 40 people were interviewed; interviews lasted between 20 and 90 minutes, and averaged about 40 minutes. At the EMO level, nine staff members across the three companies were interviewed, with interviews averaging 60 minutes.

An interview protocol was used to produce consistency across interviews. School stakeholders were asked about the school's mission and educational program, the relationship to the EMO, and how decisions were made about different aspects of the school's operations. All EMO staff members and school administrators were asked about how the EMO works to ensure "fidelity" to a company vision across multiple school sites. EMO staff were also asked about the number of corporate staff and their backgrounds and roles, and the ways in which the company seeks to support individual schools.

Interviews were taped and transcribed, and then coded using the Nud*Ist qualitative data software program, based both deductively on themes that emerged through the literature and inductively through the process of conducting the study. Following Miles and Huberman, the coded data was then used to create school profiles that addressed the central research questions (Miles & Huberman, 1994). These profiles formed the basis for the analysis, and were used to create the case descriptions presented here as well as the cross-case analysis.

## Company and School Case Descriptions

The following case descriptions offer information about each company and school and the relationships between companies and schools around educational issues.

### *Company A: Implementing a Model*

Company A is a large company that manages schools in many states. Based on several years of development, the company created a "comprehensive" model for school design that includes the educational program and the organizational structure within the school building and

between schools and the community/parents. As one company staff person said, "We basically offer a whole school reform model, or a total package." In terms of the educational program, Company A provides materials, curricula, and assessments, and requires teachers to participate in on-going professional development geared to support particular instructional approaches. Some of these pieces come from existing educational programs that are purchased by the company for their schools, and others come directly from the company. While many schools have "bits and pieces" of the elements Company A utilizes, the company aims to put these parts into one comprehensive package.

While offering the "total package," Company A stills envisions schools that are, on a day-to-day basis, managed and operated at the individual site. This expectation relies heavily on a "strong principal" model, in which building principals hold the ultimate responsibility for implementation of the company model. Thus, principals are given broad discretion in areas such as staffing and program supervision, and are able to manage their budgets within the requirements set by the company. Principals are then expected to operate schools that have improving student achievement, constant or growing student enrollments, and stay within budget expectations. While the principal is clearly "in charge," Company A schools are still organized in a fashion that, according to company staff, is designed to support a professional environment for teachers.

*Monroe*

Monroe is viewed as an exemplar of the Company A model in practice. Located in a suburban area, it serves a racially and socio-economically diverse group of students. "The model in non-negotiable" is the constant refrain one hears in the school – from administrators to teachers to board members – and echoes the principal's commitment to the company vision and

her support of the model. The principal came to Monroe from another Company A school, and has worked with the company for several years. While she has the option to hire non-Company A support staff for professional development, she chooses not to, because, she says, "It just doesn't make sense, it's a waste of my money to bring somebody in who is not about [Company A]. We're all about [Company A] and about doing the design, so anything that doesn't support or enhance what we're doing just doesn't make sense to allocate resources there."

Teacher "buy-in" is an important aspect of the principal's strategy and she takes considerable care in hiring and training. For example, when hiring, she uses interview protocols provided by Company A and makes a concerted effort to make it clear to prospective teachers that, at Monroe, they will not have the freedom that they might experience in another school. Teachers who do not buy-in to the model are not kept at the school. Although teachers are primarily "implementers," they have regular structured opportunities for discussion and collaboration with their colleagues.

While the principal is in charge of model implementation, company staff play a significant role in making sure the school closely adheres to the design. This effort includes sending national staff who work with different aspects of the design to the school to observe and provide feedback; the principal then uses this feedback in planning future professional development. Overall, the combination of a very prescriptive design and leaders committed to that design seem to contribute to the school's high level of success in implementing the design. Ironically, because of the strong internal commitment to the design, it appears that company staff are *less* needed than in other company schools that are struggling with implementation.

*McKinley*

While Monroe is the "model" Company A school, McKinley is still working to implement fully the model. The school's population is predominantly low-income, and school personnel reported challenges related to student discipline and the low achievement levels of students entering the school. However, the principal at McKinley still expressed a strong commitment to the Company A model, and chose to leave an administrative position in a local school district in order to work with the company and the model.

The model clearly guides many of the decisions made in the school. For example, while the principal has an interest in having some professional development outside of that provided directly by Company A, he said that it hard been hard to "squeeze" it into the already packed schedule of model-linked professional development. Overall, he described the relationship between the company and school as a "partnership," in which both partners expected the other to be an active participant in the school's development.

The two Company A schools, while implementing the same model, differ somewhat in terms of the aspects of the model they emphasize and their overall commitment to the model (with the Company A-trained principal at Monroe exhibiting an exceptionally high level of commitment that was echoed throughout that school). For example, the relationship with parents and the community was somewhat more emphasized at McKinley than at Monroe (although it was certainly discussed at Monroe). At both Monroe and McKinley, school leaders reported that the board was relatively autonomous from the company, and that this independence meant that the boards could choose to end their relationship with Company A if dissatisfied.

*Company B: Co-Constructing within a Vision*

Company B is a regional EMO that operates a small number of schools within a large metropolitan area. The founders of Company B had backgrounds in public education and work on school reform issues. The company remains relatively small, with fewer than 10 full-time staff at the central office. While charter schools are the largest aspect of the company's operations, staff also have worked with other schools on a variety of educational issues. After several years of working with charter schools, the company has developed an approach that emphasizes intensive company-school relationships early in a school's life, than a more minimal relationship after initial start-up has passed and stability has been gained, where schools choose from a "menu" of management services. According to one former staff member, Company B, "wants to do the necessary services and see the schools stand on their own as strong institutions and even making themselves [the company] no longer necessary."

The educational model promoted by the company incorporates some broad design principles that focus on students as resources, teachers as "facilitators" of learning, and the community as an important part of the learning process. Attention to individual student needs is one cornerstone of the model. However, within this more macro "vision" for education, there is considerable latitude for schools to develop a specific program based on their own needs, and the company does not offer specific curriculum or assessments linked to the model. In order to ensure some commonality across schools and consistency with the vision, Company B has recently designed a set of "touchstones" indicating where schools stand on model implementation. As the descriptions of the two schools show, the relationship between Company B and its schools is not so much that of a "manager" as that of a collaborator.

Together, the school and company develop the specific educational elements needed in the school within the broader context of the Company B model.

*Tyler*

Tyler is a small urban charter school with a strong sense of community among administrators, teachers and students. While the Company B model is not implemented precisely or comprehensively at Tyler, elements of it are certainly in place and people at the school are working to adhere to it more. Rather than the model being seen as company-driven, school personnel consistently identify it as their own program. Company staff are described as "supporters" who at times help keep the school focused on the vision. For example, the principal said that one Company B staffer played a critical role in reminding school staff, at regular meetings, about commitments made by teachers and administrators around the school's mission and areas in need of improvement.

A challenge for the school has been balancing a vision that emphasizes teachers constructing their own materials and curriculum with the reality of new teachers who struggle with "getting by" in the classroom and are ill-equipped to develop their own program. In response to this issue, the school and company are working together to formalize some aspects of the educational program, including adopting external mathematics and reading programs. This role of collaborator around educational issues is carried out in other aspects of the school-company relationship. Offering a menu of specific services to schools has pushed both schools and Company B to, in the words of one teacher, view the company as the "client" and the school as the "employer," rather than the company as the "boss" and the school as the "employee."

Both school and company staff report that the role of Company B has diminished with time. According to the principal, the school was founded when the head of Company B

"connected up with teachers who shared the vision. People were so excited about this – a new idea and this charter and all. So Company B played a critical role. But since then, they [company staff] tried to back off on being as involved to being more support." Overall, the role of Company B in implementing the model is one of supporter and collaborator. Teachers do not feel they are "held accountable" by the company for following the model, but instead seem to embrace it and strive towards full implementation, viewing Company B as one mechanism for helping them meet their goals.

*Taft*

Taft is a small, theme-based alternative urban school serving children who have often not met with academic success. The school's theme is designed to help excite students about their education and their future. School staff see a warm and caring school climate as a critical element of their mission. Aspects of the Company B model are in place in the school, but others are noticeably absent; staff attribute the incomplete implementation of the model in part to the challenges of working with students coming from difficult circumstances.

As is the case with Tyler, rather than Company B hammering their vision into school personnel, school staff reported that they are generally supportive of the ideas advocated by Company B and do their best to embrace the model. Because the design is a broad framework, rather than a particular set of components, school staff describe it as an "alive and growing" model, rather than something set in stone.

Company B has played an important role in setting up the school's educational program, as the two primary administrators do not come from backgrounds in education. The principal notes that he is happy to work with a company that has "seasoned professionals" in education who are still willing to "think outside the box." Thus, for example, Company B may recommend

professional development in particular instructional areas, while the school leader gives a broader vision, such as telling teachers that "the most important part of being authentic to kids is being real to yourself."

While some of the core educational structures underlying Taft's educational approach come directly from the Company B model, others have been added by the school. For example, the school recently began shifting towards a project-based learning model drawn from a different school design, which is consistent with the Company B model but not a part of it. At the administrative level, this new emphasis has been integrated with the Company B model, but some of the teachers have been resistant. As with Tyler, Taft staff have taken the Company B model and altered it to fit with what they see as the needs of their own school, while Company B staff has tried to help them retain the overall vision underlying the model.

*Company C: Facilitating School Efforts in Designing an Educational Program*

Company C is a medium-sized EMO operating in a small number of states and working with schools that have a variety of missions. Unlike Company A or Company B, Company C offers schools neither a broad educational vision nor a specific educational program. Instead, the company works with local schools to tailor a program to the charter school board's ideas about what is in the best interests of the community the school serves. However, not offering a specific vision does not mean that the company is uninvolved with the educational aspects of the schools it manages. For example, the company has emphasized to principals and school stakeholders that raising scores on their state's assessment system should be a school-wide priority. Thus, curriculum development and careful curriculum alignment with the state standards and tests has been central to the efforts of both schools studied over the last couple years.

In very specific areas, the company has adopted reforms that it is working to implement across its schools (with schools and teachers having the option to participate or not in these efforts). For example, the company is advocating a particular set of methods for special education, and is encouraging schools to provide release time to "master" teachers in order for them to provide in-class support to their colleagues. School leaders are the primary "mediator" between the company and the school, and school staff report little direct interaction with company personnel. While the board and Company C select principals jointly, the two principals in the case study schools clearly identified more with the school than with the company.

*Grant*

Grant is located in a small city with a largely poor and African-American population. While currently managed by Company C, the school began as an independent charter school, and turned to an EMO when serious organizational problems became apparent. When asked about the mission of the school, the board chair and founder said, "We want to produce quality children. They all may not be doctors or lawyers but we want to produce children that can contribute back to this community… Now if we can get our kids competitive to where they can start reading and feeling good about themselves, then we're going to create a better type of person."

The school struggled in its early years, and Company C and the principal have worked together to create a better functioning organization, with the principal and board selecting a new theme as a focus for the school, and Company C pushing the school to develop a curriculum aligned with their state standards and tests. When asked about the educational vision of the school, one teacher said, "The academic goals of [Grant] are number one, we are trying to improve our test scores… so we can continue to be state funded." In keeping with this, the

school has developed assessments carefully designed to mirror the state tests and uses these for diagnostic purposes.

Other than a somewhat vague emphasis on the school's theme and a push to improve test scores, there appears to be little cohesion in the approach to education of different teachers in the school. The company has worked on specific details of the educational program, but does not seem to have sought to work with the school to create a clear and well-defined *educational* mission.

The relationship between the school and company is described by both school and company staff as generally positive. According to the board chair, "It's not the great hand of Company C telling us what to do." Company C approaches its relationship with schools – and the educational program of those schools – as continually evolving. In the case of Grant, this has meant the company has supported the school in adopting a new theme, and worked with the school to improve state test scores as a means of demonstrating school quality and improvement.

*Garfield*

A large city is the setting for Garfield, a charter school that serves a predominantly Latino student population. According to one board member, the mission of the school is, "to educate children at their developmental levels in a culture that supports them." Included in this mission is a focus on developing the students' abilities to read and write in English. The founders of the school sought a management company because they felt they did not have the necessary educational and business expertise needed to operate a school. At the same time, they felt strongly that "ownership" by the board and the community was critical, and feared that a company with a clearly defined model would limit their ability to shape the school in ways they thought were important for the community. Company C has fit their preferences well, allowing

them, for example, to hire a school leader from the community the school serves who shares the educational philosophy of the founders.

The educational program of the school has evolved considerably over the last few years, with a recent focus on developing a school-wide curriculum aligned with the state standards and an increasing concern about test scores (somewhat driven by the state context). Selection of professional development for teachers is similar to that found in many school districts, with some workshops offered for all teachers in the school (based in part on results from teacher surveys), and other opportunities for individual teachers to attend workshops in their particular areas of interest (Little, 1989). Collaboration among teachers is encouraged by the administration, and teachers report working with each other on curriculum issues and special projects, but there is not the formal inclusion of collaboration found in a model such as Company A's.

Both parties describe the relationship between the school and company as good. According to one of the founders, the board is largely "in charge," but the company still has certain expectations; he said, the company's "pretty good in empowerment, where they're going to hold you accountable for your test scores, but how you establish a school and how you want to make the school work, that really is up to the school leaders and the board for the most part." The school leader describes the relationship as one in which the company provides the "infrastructure" for the school; he says, "All things you need in order to make your house work, they provide that to me."

**Discussion**

As these cases demonstrate, not all EMOs (or the schools they manage) are created alike. Even companies that identify themselves as offering "comprehensive management services" vary in the nature of their educational designs and the ways in which they work with schools around

educational issues. An added layer of complexity is that these designs and relationships have evolved over time, making EMOs a "moving target," both as companies have learned through trial and error and as individual schools have grown and their needs for external support have changed. This section first examines the nature of the approaches to education used by each company and the process of developing the program across these companies and six schools. The findings from these questions build to an examination of the broader question – are EMOs recentralizing decentralization around educational issues?

*The Nature of the Design*

Considerable variation in the overall approach to designing an educational program was evident among the three companies in this study. In research on whole school reform, Bodilly and her colleagues found some important distinctions among the specific designs used by different teams (Bodilly, 1996). Among these was the difference between designs developed primarily by an external team, and those that involve considerable development at the school site. The three companies in this study also had designs that varied considerably on this spectrum, with Company A offering a very company/team-developed and specified model, Company B offering a more general school-based vision within the context of design principles, and Company C offering an extremely school-based program, with no real design principles beyond attending to the state standards and testing where a school operated.

One way to look at this relationship between companies, schools and the educational aspects of those schools is to consider where the educational approach "sits." As Figure 1 demonstrates, the educational model for Company A exists completely within the company itself, the educational vision for Company B operates between the school and the company, and

the educational program in Company C schools existing almost completely within the purview of the individual school.

Differences between the designs offered by these companies involve not only where the program is developed, but also its level of specificity. For Company A, the educational program is not only designed external to schools, but is highly specified. Company B has a set of clear design principles that shape some of the structures in the schools with which they work, but the company does not offer specific materials, curriculum, etc. However, the use of organizational structures (especially around decision-making) has led to some commonalities in educational approach.

Company C, with its solely school-developed educational approach, requires schools to develop their own programs, which often "evolve" over time, experiencing the benefits and challenges that come with a less specified design. The two Company C schools demonstrate some of these benefits and challenges. In both cases, school personnel reported considerable control over the educational program; however, the lack of external guidance places the need to develop a central vision on school personnel. While each school had a general "mission" involving what they thought a "successful student" would be like, neither had a clear *educational vision* that drove curriculum, assessment, professional development, etc. For these schools, the lack of educational direction has made the state standards and testing a significant portion of the de facto educational goals.

Each design used different tools, such as curriculum, assessments, materials, and staffing structures, to influence school educational programs (Bodilly, 1996; Bulkley, Fairman, & Martinez, In Press; Spillane, 2000). Company A drew on a full array of educational and structural tools used by school districts and whole school reform design teams, while Company

B focused on structural tools and Company C relied primarily on external [state] standards and testing.

The striking similarities between the nature of the designs offered by Company A and Company B and those offered through whole school reform model design teams, as well as the similarities between the tools used by companies and districts, suggests EMOs are experiencing a certain level of isomorphism (Bulkley, 1999; DiMaggio & Powell, 1983). According to Hawley, "Isomorphism is a constraining pressure that forces one unit in a population to resemble other units that face the same set of environmental conditions (DiMaggio & Powell, 1983, p. 149, citing Hawley, 1968). Thus, EMOs, operating in the uncertain environment of public education, have begun to share qualities with existing organizations confronting the same challenges.

*The Process of Developing Schools' Educational Programs*

The role of companies and schools in developing the actual local educational program varied, primarily due to the nature of the design itself. Themes that cut across the companies and schools included the role of staff in developing versus implementing a program, affiliations of staff to companies versus schools, and the importance of leadership at the building level.

The highly prescriptive nature of the Company A design meant that school-level personnel were largely viewed as implementers, rather than designers, of these schools' educational programs. Thus, reaching agreement about what should happen at the school level was a matter of promoting "buy-in" in a variety of ways. In such a context, it became easy for school personnel to see themselves as "staff" for Company A as a company, and develop a strong sense of affiliation with the company. This was particularly true at the Monroe school, where the principal was the "keeper of the model." While the model itself is an important part of the success (or failure) of the schools operated by Company A, leadership is also considered

crucial by company and school personnel. The principal at Monroe argued that, "There's that old saying, as the principal goes so goes the school. So you can have a principal that doesn't buy-in... Even if you have the design there, the other part may fall apart." (Comments by staff at all three companies reflected this view of principals as critical to school success.) That the Monroe principal was trained by Company A while the other principal came from a public school district appeared to effect the level of commitment to the model found at each school.

The Company B model is much less specified than Company A's, and implementation required considerable decision-making at the school site level, with collaboration around educational issues central. Staff at the two Company B schools identified themselves primarily with the individual school, but also noted strong school-based commitment to the model supported by the company. Leadership in the two Company B schools reflected this collaborative spirit, as multiple stakeholders were encouraged, and needed, to actively participate in taking broad design principles and building on them to create an educational program appropriate to each school.

The two schools managed by Company C developed educational programs on their own, turning to the company for guidance and advice as needed. School personnel, other than school leaders, felt little allegiance to the company and saw it more as an organization that provided specific services (i.e. sent their paychecks). For school stakeholders, this fit with their desire for "ownership" of the educational program. One administrator at Garfield commented of the company that, "they give the schools themselves such authority to do what is in the best needs of that school... I like the fact that they give the schools an opportunity to create what they need to do without imposing a lot of limitations on them." No one leadership style was promoted by the

company and the two schools had very different leaders – Garfield's was more collaborative, while the principal at Grant played the primary role in building decision-making.

The differences in the nature of the designs themselves means that the notion of implementation "fidelity" has different connotations for Company A and Company B schools, and is not meaningful for Company C schools (where the outcomes on state tests are the primary means of "checking" if the company's educational goals are being met at a particular school site). For the Company A schools, fidelity of implementation is relatively easy to define – the school and its teachers range in their practices on each element of the design between not implementing and fully implementing. For Company B schools, however, staff at both schools and the company seem to view the model as something that is a "living" ideal, with some very specific aspects where implementation is easy to "measure," and other aspects that require the schools to continually revisit the model and reinterpret it within their specific context.

*Are EMOs Recentralizing Decentralization?*

The central question underlying this paper is whether or not the presence of comprehensive management EMOs are creating a new centralizing force around educational issues for the decentralizing reform of charter schools. As the above analysis suggests, there is considerable variation, but, even in the case of the company that has the least influence on educational decisions (Company C), there are more decisions made outside the school than for a charter school that does not work with a management company. The shift of decision-making away from the school and towards a central authority is most notable in the case of "high-influence" companies such as Company A (Bulkley, In press).

While school-based autonomy has been a hallmark of the charter school movement, the experiences of these three companies and six schools suggest that there may be advantages, in

some cases, to "trading" school-site control for a clear structure and educational technology. As Wohlstetter and Griffin found when studying the presence of "learning communities" in charter schools, autonomy does not guarantee a clear educational mission, and without such a clear mission such autonomy may be of little benefit (Wohlstetter & Griffin, 1998). Grant and Garfield, the two schools managed by Company C, had neither clear internal educational missions nor externally-defined ones; this lack of mission "opened a door" to schools that focused on the state standards and testing as their primary educational goals.

Addressing the question of recentralizing decentralization also requires looking both at how EMOs influence school behavior, and at the ways in which schools maintain a level of power in these relationships. In Hirschmann's classic book, *Exit, Voice and Loyalty*, he explores the ways in which citizens or members of organizations can respond to dissatisfaction (Hirschmann, 1970). Such responses dictate the power that individuals (or collections of individuals) have when they are dissatisfied. He identified a typology of responses, including *exit* (leaving the organization or jurisdiction), *voice* (making an active attempt to influence/create change), and *loyalty* (maintaining a relationship, often for economic reasons, and waiting for improvement). Others identified a fourth category, *neglect*, where participants passively allow conditions to deteriorate (Lyons & Lowery, 1986; Rusbult & Lowery, 1985). This typology has been applied to a variety of situations in which individuals or collections of individual may be dissatisfied, ranging from locational housing preferences (Lyons & Lowery, 1986) to romantic involvements (Rusbult & Zembrodt, 1982).

Decentralization in education, as it alters control and power relationships, has traditionally been thought of in terms of allowing those most involved with a school to make decisions about that school (c.f. Hannaway, 1993; Plank & Boyd, 1994). In Hirschmann's

typology, this should result in school stakeholders having a greater voice in expressing dissatisfaction and receiving responses to their concerns. Voice through decision-making, advocates have argued, increases school autonomy and will enhance the educational process (Malen, Ogawa, & Kranz, 1990; Wohlstetter, Mohrman, & Robertson, 1997). In the case of charter schools, decentralization has been portrayed as enhancing voice and autonomy for schools, and providing parents with more means to express their dissatisfaction through both greater voice (because decisions are made at the school level), and through exit (since charter schools are schools of choice).

However, decentralization can also be thought of more broadly as altering power relationships – which may or may not be tied directly with daily decision-making. In this study, stakeholders in the EMO-managed schools did often experience less voice than would be expected from a charter school working "independently." However, while the "exit" option for parents has been included in discussions of charter schools and school choice more generally, it hasn't been considered for schools. The schools in this study have an "exit" option generally not available to district-operated schools and different from that available to locally run charter schools – in theory, if they are dissatisfied with their EMO, they can choose not to renew the contract. Thus, local stakeholders (specifically, charter school boards) still hold considerable power in terms of broad policy, but may have less influence on daily operations. Interestingly, school stakeholders working with all three companies spontaneously discussed this option in interviews.

Of the 15 comprehensive EMOs studied in the earlier paper, eight reported that there were schools that they had previously managed where the relationship was ended (Bulkley, In press). The most common explanation, from the company perspective, was a mismatch between

the goals or management style of the company and local charter board; one company staff person commented on, "the inherit tension that exists between management company and non-profit board." In some cases, schools hired a different manager, while in others, they chose to "go it alone." (None of the schools in this study were operated in company-owned facilities, which would likely alter the power equation. The two companies in the earlier study that do own most or all of their facilities have *not* had any schools that "exited.")

Looking at decentralization as power, all six schools in this study could theoretically express dissatisfaction with the company through the exit option, but they varied in their ability to use voice to influence the educational program. However, exit is simultaneously a powerful and difficult tool to actually use. Rusbalt and her colleagues found that greater "investment" into a relationship led to a higher level of loyalty, and discouraged individuals (or collection of individuals) from choosing to "exit" unsatisfactory situations (Rusbult & Zembrodt, 1982). The more resources (especially time and money) that a school has committed to the model of a particular company, the more difficult it may be for them to exit. Thus, the companies with the most specified models requiring the most investment around materials, professional development, etc., may also be the most difficult companies for charter schools to "exit." On the other hand, of the schools included in this study, those working with Company A had been most involved in school-level capacity building, which may increase their ability to operate without the company's involvement.

Rusbult and her colleagues also found that the availability of superior alternatives encouraged exit, while the lack of such options discouraged exit even when the individual was dissatisfied. While EMOs may "look" much like other organizations – such as districts – in the way that they manage the day-to-day operations of individual schools, the "exit" option has the

potential for creating a very different type of school-manager relationship. The possibility of exit for schools working with management organizations involves not just dissatisfaction, but also exit because schools have "out-grown" their EMO (a possibility commented on by several school staff members and staff at Company B).

**Conclusion**

The three companies and six charter schools studied in this paper demonstrate the variability of approaches used by EMOs, as well as some of the common threads (such as the importance of school leadership). EMOs and the schools that work with them have found different paths to school educational programs, ranging from a very top-down approach with Company A to the more collaborative or bottom-up approaches used by Company C and Company B. For schools, understanding the nature of the designs offered by EMOs and where these designs "sit" can lend important insights into what role the school will play in the educational program offered – implementer, collaborator or creator (see also Hassel, 1999).

The issues of power, especially as related to exit and voice, raised in these cases have implications beyond the charter school/EMO relationship. In an era of increasing privatization in education (Murphy, 1996) – from whole schools to technology to tutoring services – further exploration of the issues of voice and exit and their influence on issues of power are critical. On the one hand, exit theoretically provides organizations with power over those who offer services – for charter schools working with EMOs, this means that they can discontinue unsatisfactory relationships, and use their option of exit to enhance voice within the school.

On the other hand, the feasibility of exit in cases of privatization needs to be better understood. In a study of employee dissatisfaction, Withey and Cooper found that "loyalists" – those who stayed in organizations despite dissatisfaction or an ability to effect change – ended up

in situations that resembled "entrapment" because of the difficulties of viable exit (Withey & Cooper, 1989). Of particular importance is further investigation into the contexts within which public organizations are and are not able to exit privatized arrangements, including the constraints on exit for public organizations such as issues of investment and the cost of changing providers, as well as the availability of viable alternatives.

Table 1

*School influence on educational program and school structure*[3]

| | School influence on mission | School influence on curriculum | School influence on classroom assessment | School influence on instruction | School influence on school governance/ organizational structure | School influence on professional development |
|---|---|---|---|---|---|---|
| Company A | Low | Low | Low | Medium | Low | Low |
| Company B | High | Medium | High | High | Medium | Medium |
| Company C | High | High | High | High | High | High |

Table 2

*School influence over fiscal and personnel issues*

| | School influence on school budget | School control of facilities | School influence on teacher hiring | School influence on principal selection |
|---|---|---|---|---|
| Company A | Low | Medium | High | Medium |
| Company B | High | High | High | Medium |
| Company C | Medium | High | High | Medium |

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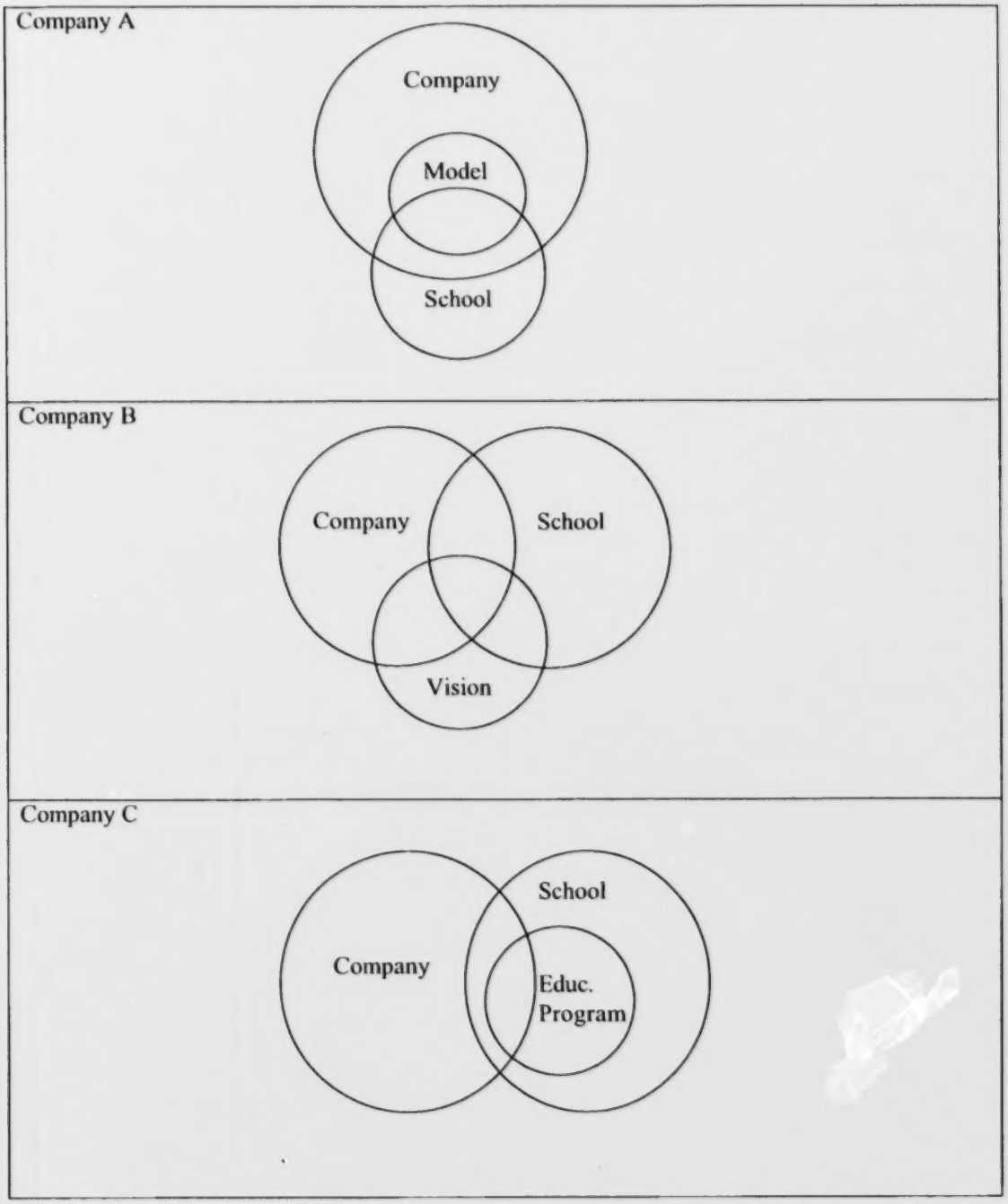
[3] For both tables, "school" includes the staff, parents and students at a particular site, as well as the charter school's board.

Figure 1


Company A
Company
Model
School
Company B
Company
School
Vision
Company C
School
Company
Educ.
Program

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